

Appointment
Scheduled for:
_____,
_____AM/PM

Chesterfield Circuit Court
P. O. Box 125
Chesterfield, VA 23832-0125
Phone: 804-748-1241
Probate Fax: 804-717-6797

PROBATE APPOINTMENT CHECKLIST

PLEASE CALL TO SCHEDULE A PROBATE APPOINTMENT AND BRING THE FOLLOWING DOCUMENTS AND INFORMATION:

- **Original Will and Codicil(s):** All dates should match and signatures should be notarized.
- **Death Certificate of the Decedent:** Must be a certified copy with a raised seal. If a named executor or a bloodline heir that has first right to qualify *is deceased*, we will require a certified copy of his/her death certificate.
- **List of Assets:** Determine the estimated dollar value of the assets held only in the decedent's name. PLEASE COMPLETE THE ATTACHED FORM REGARDING ASSET DETERMINATION.
- **Depositions/Waivers:** If the will or codicil is not self-proving (properly executed) or in some cases, if the will is holographic (handwritten), then depositions from witnesses and/or the notary are required. Waivers of qualification will need to be provided if an executor named in a will or codicil, or an heir that has the first right of qualification desires to waive his/her right to qualify as an executor or administrator. Please bring any waivers to the probate appointment. All forms must be NOTARIZED unless signed in the presence of a deputy clerk. The Clerk's Office has forms available, as needed.
- **Check or Cash for the Probate Fees:** The amount will be determined at the probate appointment and are due at the time of the appointment. **A valid government issued photo identification must be presented.** (e.g. driver's license, DMV personal identification card, U.S. military card)

- **Bondsperson for Surety Bonds:** If it has been determined that surety is required on your fiduciary bond, it will be necessary for you to arrange for a bondsman to be present at your designated appointment. You may request a list of local bondspersons from the Clerk's Office to assist you in obtaining the bondsperson of your choice.
- **Appointment of Resident Agent:** All non-resident fiduciaries must appoint an in-state resident to serve as a resident agent. Prior to being appointed as resident agent, this individual must consent to the appointment in writing. A form is available in the Clerk's Office for this purpose.
- **List of Heirs:** Include the names and relationship to decedent and addresses of the decedent's bloodline heirs. If an heir is deceased, include his/her name (as deceased) and also include his/her heirs. Use additional sheets, if necessary. **Be sure to include first, middle and last names of the heirs.**

Name_____Relationship_____

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Address_____

Name_____Relationship_____

Address_____

Name_____Relationship_____

Address_____

Name_____Relationship_____

Address_____

Name_____Relationship_____

Address_____

Name_____Relationship_____

Address_____

Name_____Relationship_____

Address_____

- **Location:** The probate office is located in the Chesterfield Circuit Court Clerk's Office which is in the new court building at 9500 Courthouse Road (at the intersection of Ironbridge and Courthouse Roads). Come through the glass doors at the front of the building, proceed through security, take an immediate left and enter into the Circuit Court Clerk's Office. Once in the Clerk's Office, proceed to the receptionist desk and advise the receptionist that you have a probate appointment.